



**McKinley
Carter** WEALTH
SERVICES

EQUIP YOURSELF
FOR A GOOD LIFE

Brian T. Gongaware, CFP®
Principal and Regional Managing Director

EQUIP YOURSELF FOR A GOOD LIFE

Preparing for a lifelong financial journey requires an understanding of the possibilities, potential resources, and identification of contingency plans. The journey likely will require navigating a series of obstacles through varying conditions. You don't have to sacrifice a Good Life today for a Good Life solely in retirement. How can we live a Good Life now and in the future? Today we unpack six critical actions required to equip yourself for a Good Life, *financially*.

- 1 Gird Yourself with a Comprehensive Financial Strategy**
- 2 Design and Articulate a Realistic Set of Financial Goals**
- 3 Stand Firm in the Face of Diversity and Threats**
- 4 Build a Defense System to Protect Your Resources**
- 5 Craft a Commitment to Developing the Practices Required**
- 6 Accumulate Resources and Be Opportunistic in Changing Environments**

So, how do you define a “good financial life?” Your specific description will be unique to your priorities, values, and desires. Our experience is that most people could use some help articulating and testing realistic financial goals. The most common goals include basic living expenses, automobiles, travel, education, weddings, home renovations, vacation home, charitable intentions, and/or a major purchase.

There likely will be times in which your financial security or expectations will be threatened. Having a well-grounded and rational approach will help you stand steady, be prudent, and act boldly and confidently. Financially there are threats in which we can diversify our risk and others in which are non-diversifiable. We must design a fortitude to protect our resources from harm.

There are also times when it seems like we are on a downhill coast and others where the climb will never end. Rarely is our financial life a smooth, level journey. You will be tested to call upon different experiences and strategies. We can find ourselves unsure as to how many resources are necessary for the entire journey and how we should manage our reserves for the uncertainty.

THE FINAL MILE

Unfortunately, or fortunately, none of us know where or when we will reach our finish line. However, we will need to successfully navigate such key financial matters such as Financial Autonomy, Tax Planning, Estate Objectives, Debt Management, Career & Business, Investments, and Risk Management.

Your professional advisor can spot financial blind spots and help you successfully circumnavigate the landscape.

We invite you to learn how our leadership, expertise, and support empower families, businesses, and non-profit organizations to take great care of their total financial situation. In so doing, we help you navigate economic and financial uncertainties, attack the unknown obstacles that are inevitable, and pace yourself to maximize your resources for the entire journey.

Reach out for a consultation today.

CONTACT US

LET'S CONNECT AND THRIVE

Servicing clients across the nation from offices in West Virginia, Pennsylvania, and Ohio.

 (866) 306-2400

 info@mc-ws.com

McKinley Carter

MASTER YOUR WEALTH.

